



E-cigarette, tobacco-free snus and heated tobacco user survey 2021

NNA Smoke Free Estonia
<https://nna.ee>
info@nna.ee

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INTRODUCTION

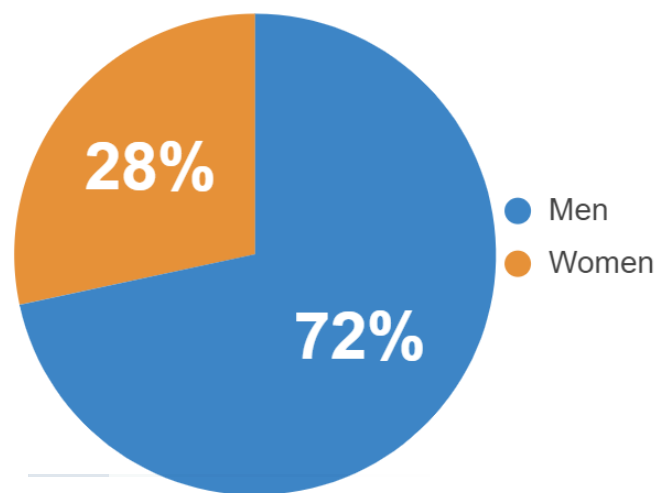
Overview of the survey and participants

From 03.12.2020 to 07.03.2021, NNA Suitsuvaba Eesti MTÜ conducted a survey among users of e-cigarettes, tobacco-free snus and heated tobacco. The survey was conducted online, and the call for participation was spread on social media, on various related websites, as well as in community and store newsletters.

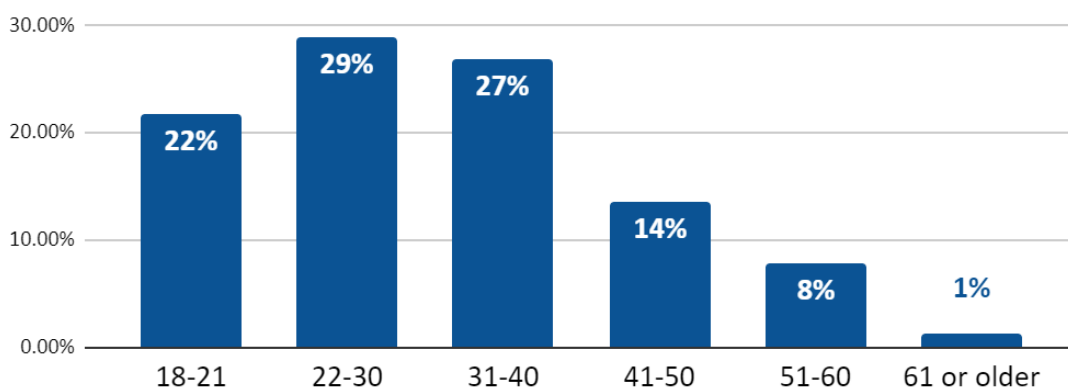
The survey involved **603 people**, 72% of whom were men and 28% women. By place of residence, most participants were from the City of Tallinn (30%), Harju County (excluding the City of Tallinn) (17%), Tartu County (excluding the City of Tartu) (12%), and the City of Tartu (10%). Followed by Pärnu County (5%), Lääne-Viru County (4%) and Viljandi County (4%). The share of people from other counties was up to 3%.

The largest share of respondents were aged 22-30, accounting for 29% of all respondents. They were followed by respondents aged 31-40, accounting for 27% of all respondents. 18-21-year-olds accounted for 22% of all respondents, 41-50-year-olds for 14% and 51-60-year-olds for 8%. Among those who participated in the survey, 1% were aged 61 and over.

Gender division of respondents



Age division of respondents

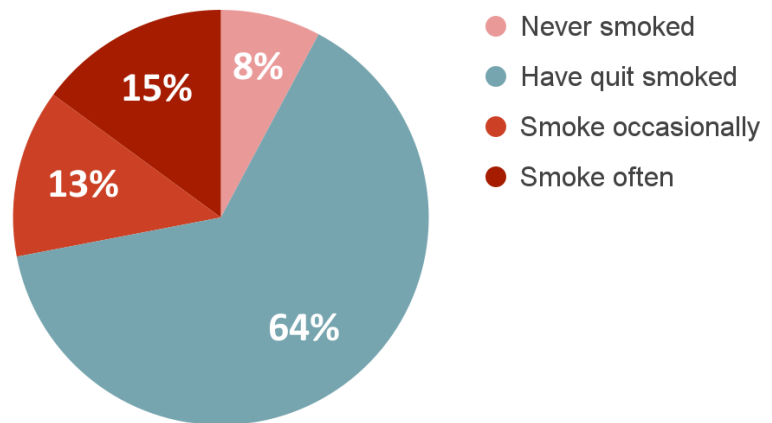


Survey participants' experiences with smoking

Participants were asked what their experience with smoking was. 64% of respondents indicated that they no longer smoked, 15% smoked often, 13% occasionally and 8% had never smoked.

Former and current smokers were asked how long they smoked or had been smoking. Among former smokers, 23% had smoked for 15-25 years, 21% for 3-6 years and 16% for 10-15 years. Among those who had quit smoking, 11% were those who had previously smoked for 1-3 years, 6-10 years and 25-35 years. 5% had smoked for more than 35 years and 3% for less than one year before quitting.

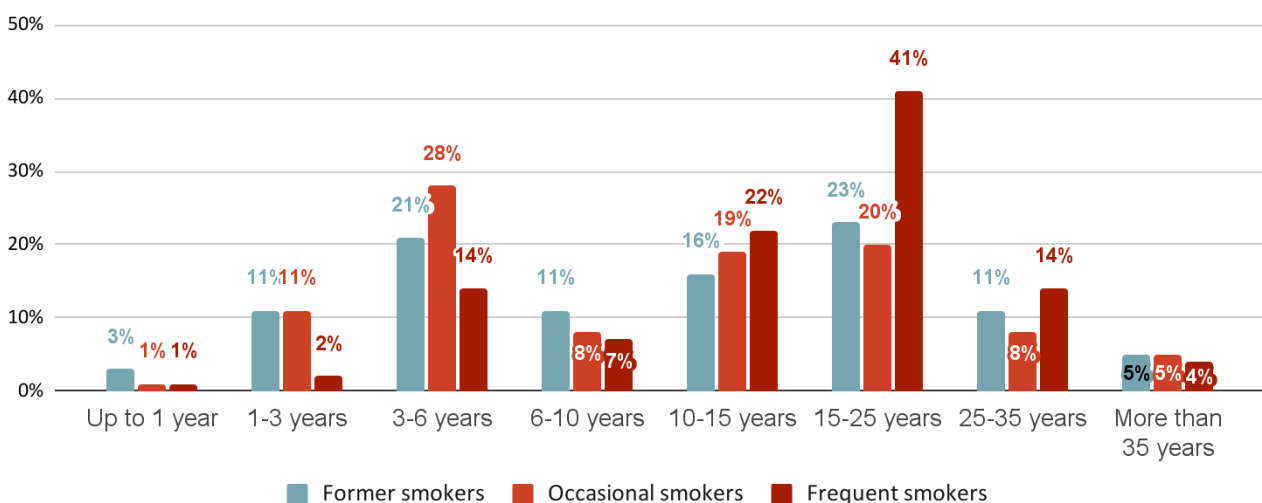
Smoking experience of respondents:



Of those who reported being frequent smokers, 59% had been smoking for more than 15 years. 22% of frequent smokers had 10-15 years of smoking experience. 14% had smoked for 3-6 years, 7% for 6-10 years and 3% for less than three years.

Among occasional smokers, 28% were those who had smoked for 3-6 years, 20% for 15-25 years, and 19% for 10-15 years. 12% of occasional smokers had smoked for less than three years. Equally 8% were both those who had smoked for 6-10 years and those who had smoked for 25-35 years. 5% of occasional smokers said they had smoked for more than 35 years.

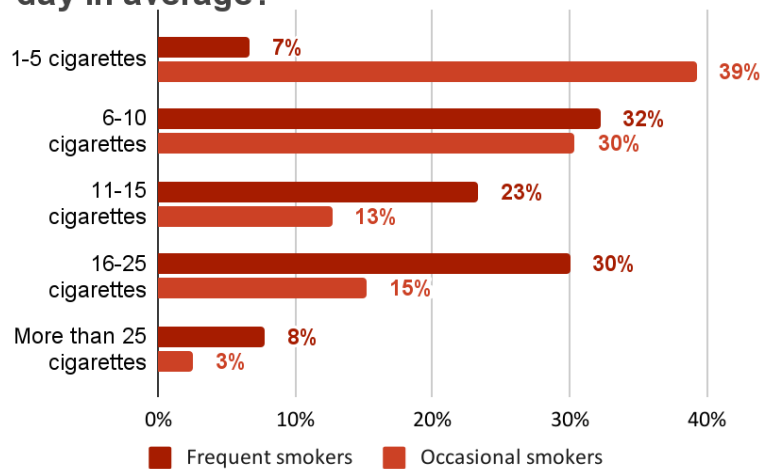
Former and active smokers division by smoking experience



14% of former smokers stated that they smoked an average of 1-5 cigarettes a day. An equal 22% of former smokers were those who smoked 6-10 cigarettes a day, as well as those who smoked 11-15 cigarettes a day. 29% of former smokers said they smoked an average of 16-25 cigarettes a day and 11% smoked more than 25 cigarettes a day.

The responses of current smokers revealed that while some estimate the number of cigarettes smoked per day for occasional smoking, others found that the same number of cigarettes meant frequent smoking. Of those who indicated that they smoked frequently, 7% smoked an average of up to 5 cigarettes a day. 32% smoked an average of 6-10 cigarettes a day and 61% smoked more than 10 cigarettes, that is more than half a pack a day, including 10% of those who smoked more than 20 cigarettes a day, that is more than a pack per day. Of those who indicated that they smoked occasionally, 39% smoked an average of up to five cigarettes a day. 30% smoked 6-10 cigarettes and 31% smoked more than half a pack of cigarettes a day.

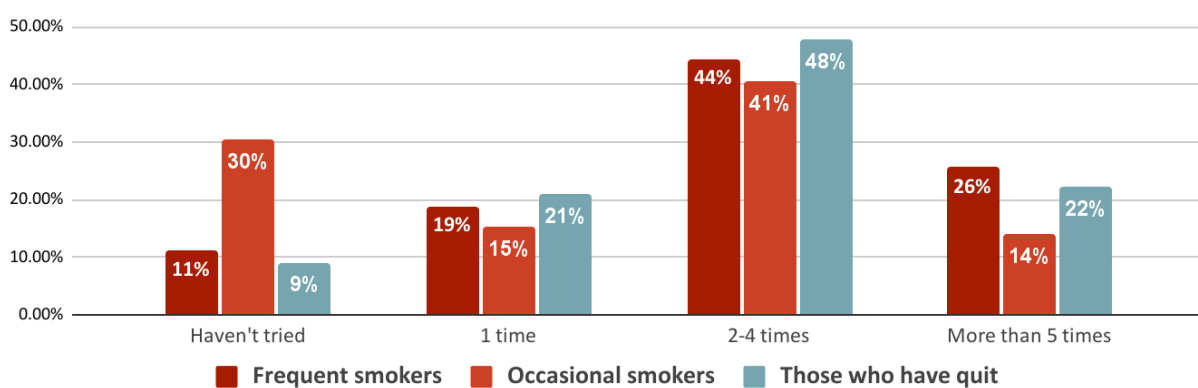
How many cigarettes do you smoke every day in average?



Quitting smoking

11% of frequent smokers had not tried to quit. 19% had tried once, 44% 2-4 times and 26% more than five times. Of the people who smoked occasionally, 30% had not tried to quit smoking, 15% had tried once, 41% 2-4 times and 14% more than five times.

How many times did you try to quit smoking?



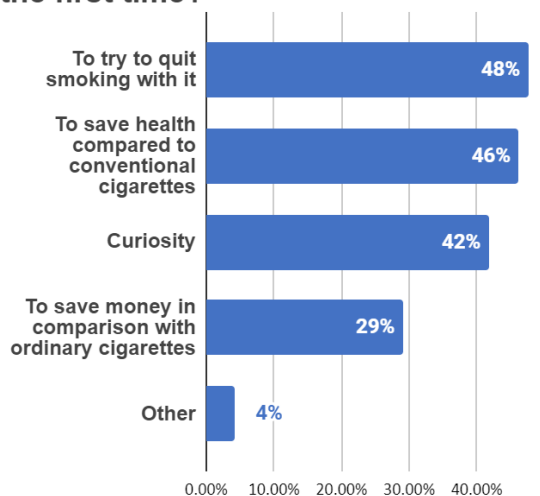
Of those who no longer smoked, 9% had not tried to quit. 21% had tried to quit smoking once, 48% had tried 2-4 times and 22% more than five times.

USING E-CIGARETTES

Experience in using e-cigarettes

94% of the participants in the survey had come into contact with e-cigarettes. 74% of men and 26% of women had used e-cigarettes at least a few times. Of those with experience in using e-cigarettes, 22% were 18-21 years old, 29% were 22-30 years old, 27% were 31-40 years old, 13% were 41-50 years old, 8% were 51-60 years old, and 1% were 61 or older.

Why did you try the e-cigarette for the first time?



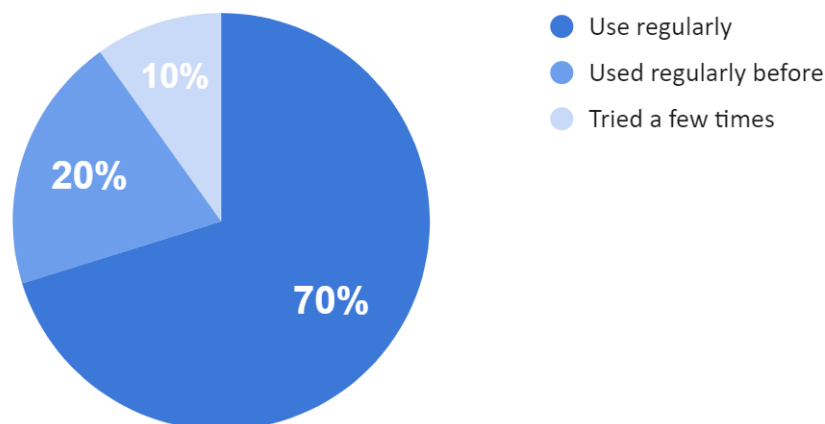
Those who had experience with e-cigarettes were asked why they had tried it for the first time. Respondents had the opportunity to mark multiple answers and, if necessary, add the answers they needed. 42% of respondents mentioned several reasons.

48% of the respondents stated that the reason for using an e-cigarette for the first time was the desire to try to quit smoking, 17% of the users said it was the only reason.

46% of respondents wanted to save their health compared to smoking regular cigarettes, for 14% this was the only reason.

42% stated that they tried e-cigarettes for the first time because of interest, including 21% of those who said interest in e-cigarettes was the only reason to try them. 4% of respondents added additional reasons, including the desire to avoid the smell of smoke, find a replacement for menthol cigarettes, and friends' reluctance to smoking.

E-cigarette experience of the respondents



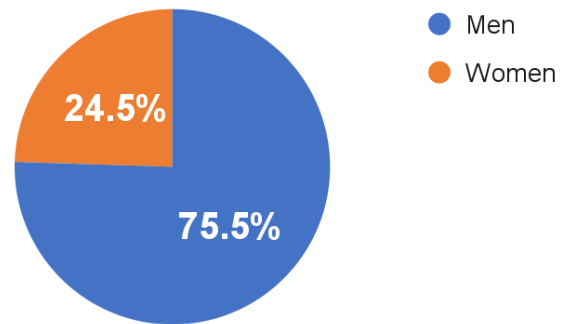
70% of those who had come into contact with e-cigarettes used them regularly. 20% stated that they had used e-cigarettes regularly before, and 10% tried them only a few times.

Regular e-cigarette users

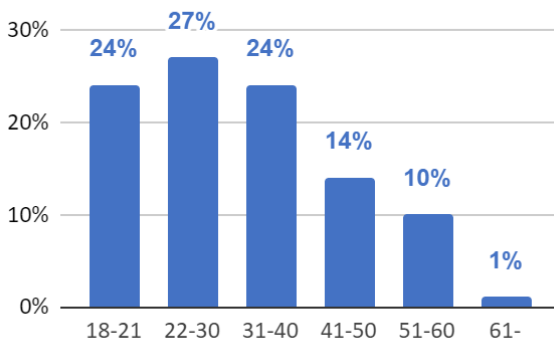
Among regular e-cigarette users in the survey, 75.5% were men and 24.5% were women. 45% of the e-cigarette users who participated in the survey were from Tallinn and Harju County, 25% from Tartu and Tartu County, and the remaining from the rest of Estonia.

Most (27%) of regular e-cigarette users were aged 22-30. Among regular e-cigarette users, there were equally 24% of those aged 18-21 and 31-40. 41-50-year-olds accounted for 14% of regular e-cigarette users. 10% were aged 51-60 and 1% were over 60.

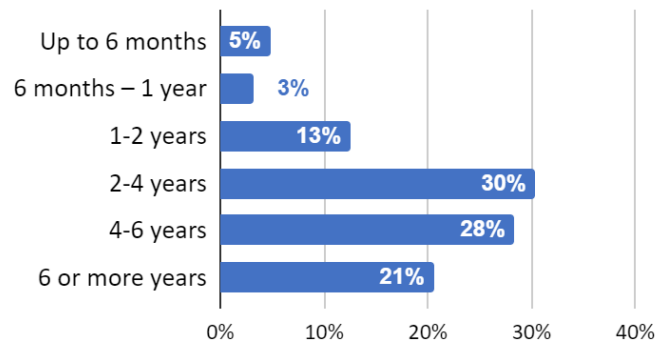
Regular e-cigarette users



Regular e-cigarette user division by age

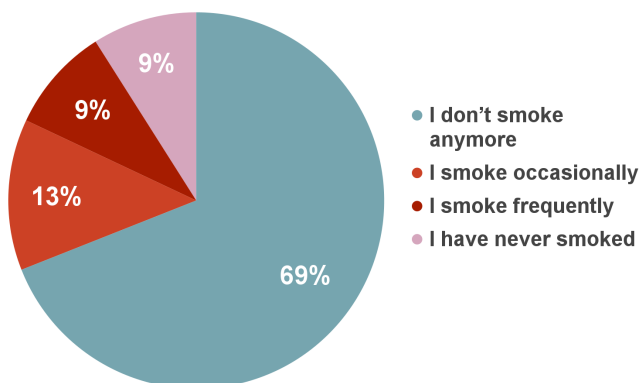


Regular users division by e-cigarette use time



5% of regular e-cigarette users had used e-cigarettes for less than 6 months. 3% had used e-cigarettes for 6 months to a year. 13% of regular e-cigarette users had used them for 1-2 years, 30% for 2-4 years and 28% for 4-6 years. 21% of regular e-cigarette users had used e-cigarettes for six years or more.

E-cigarette users divided by smoking experience



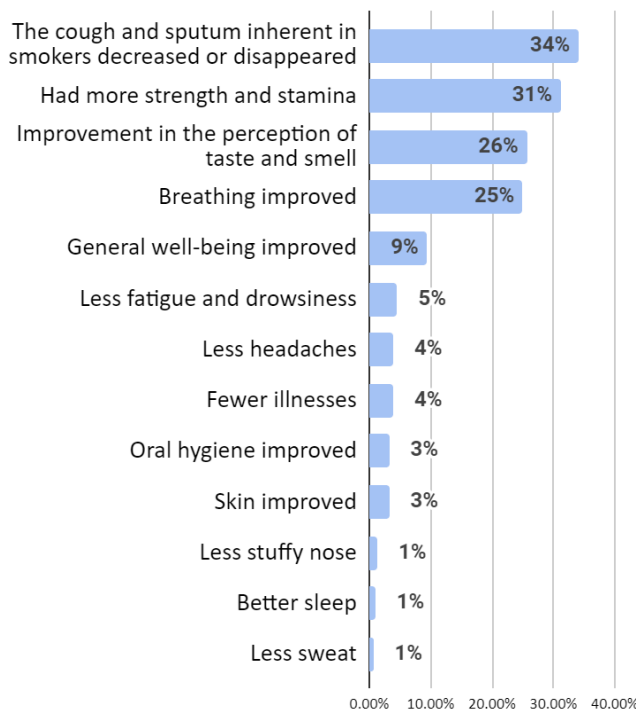
69% of e-cigarette users no longer smoked. 13% stated that they smoke occasionally and 9% smoke frequently. 9% stated that they had never smoked.

Health effects of e-cigarettes

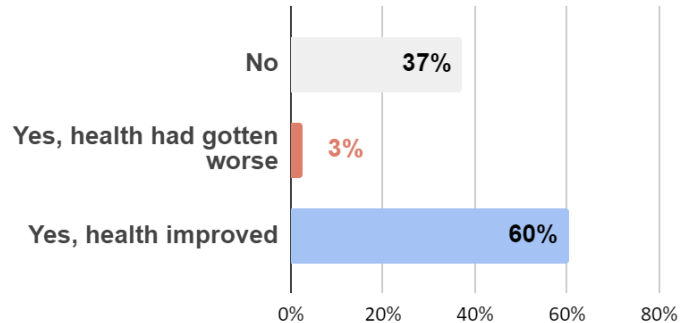
Current and former regular e-cigarette users were asked if they noticed any changes in their health after introducing e-cigarettes. 37% said they did not notice any change in their health, 3% said their health had gotten worse and 60% said their health had improved.

Those who noted that their health had gotten worse said in self-written answers that it was due to weight gain, increased sweating, breathing problems and poorer oral hygiene.

What health changes did you note after starting using e-cigarette?



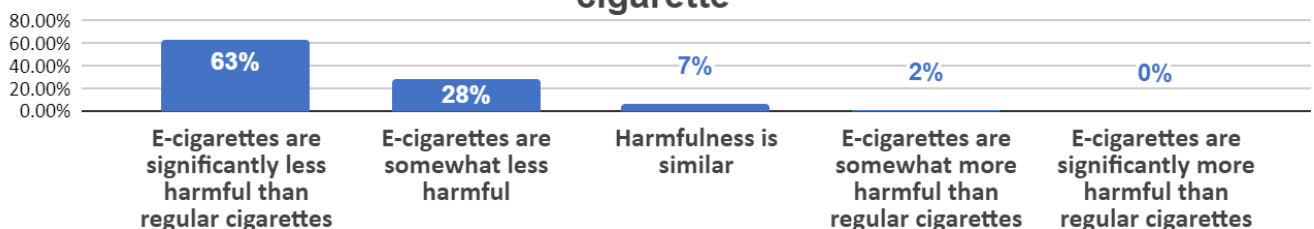
Did you note changes in your health after starting using e-cigarette?



Among those who said that their health improved after the introduction of e-cigarettes, 34% said that the cough and sputum inherent in smokers decreased or disappeared. 31% said they had more strength and stamina and their athletic shape improved. 26% pointed to an improvement in the perception of taste and smell. According to 25%, their breathing improved. In addition, it was pointed out that the general well-being improved, there was less fatigue and drowsiness, as well as headaches and fewer illnesses. Some pointed out that their oral hygiene and skin improved.

All participants in the survey were asked about the health effects of e-cigarettes compared to regular cigarettes. 63% of respondents found e-cigarettes to be significantly less harmful than regular cigarettes and 28% found e-cigarettes to be somewhat less harmful. 7% found the harmfulness to be similar and 2% found e-cigarettes to be somewhat more harmful than regular cigarettes.

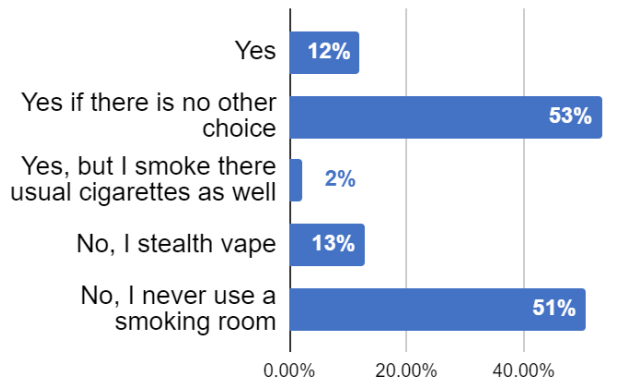
Participants' evaluation of the e-cigarette influence compared to usual cigarette



Using e-cigarettes in smoking rooms

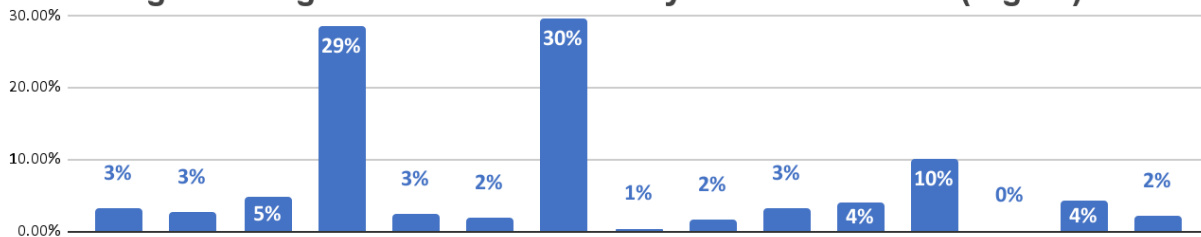
Regular e-cigarette users were asked whether they used smoking rooms to smoke e-cigarettes. 12% answered that they used smoking rooms for smoking e-cigarettes, 2% said that they often smoked regular cigarettes there as well. Although 51% said they would never go to a smoking room for an e-cigarette, only 26% said it was their only answer. 53% stated that they used a smoking room to smoke an e-cigarette only when there were no other options. 13% said they smoked e-cigarettes secretly and would not use the smoking room.

Do you use smoking room to smoke e-cigarette?



E-liquids

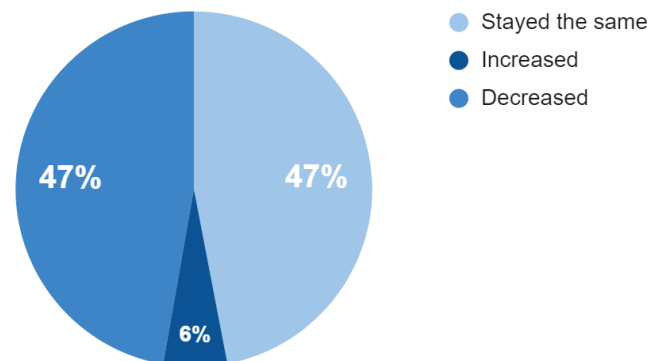
Regular e-cigarette users divided by nicotine content (mg/ml)



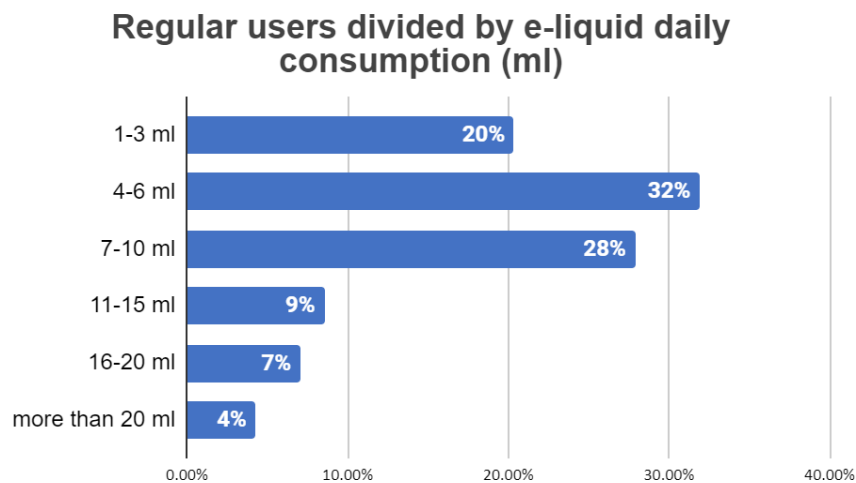
E-cigarette users were asked what nicotine-containing e-liquid they used. In Estonia and the European Union, it is permitted to sell e-liquids with a maximum nicotine content of 20 mg/ml. The survey found that 30% of e-cigarette users consumed e-liquids with a nicotine content of 6 mg/ml. 29% of consumers used e-liquids with a nicotine content of 3 mg/ml and 10% with a nicotine content of 12 mg/ml. Users of e-liquids with different nicotine contents remained below 5% in each group. At the same time, 80% of e-cigarette users used e-liquids with a maximum nicotine content of 10 mg/ml. Nicotine-free e-liquids were used by 3% of respondents. 2% of the respondents used e-liquids with the maximum allowed nicotine content.

E-cigarette users were asked how the nicotine content of the e-liquids they consume had changed over time. 47% had used e-liquids with the same nicotine content and 47% had switched to a lower nicotine content. 6% of e-cigarette users said they had started using e-liquids with a higher nicotine content over time.

Nicotine content change in e-liquids



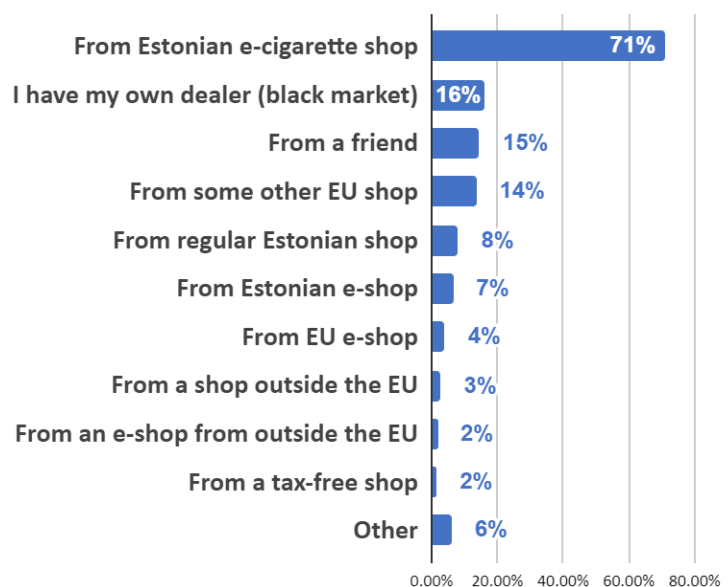
Half of the e-cigarette users in the survey consumed up to 6 ml of e-liquid per day. 32% of e-cigarette users consumed 4-6 ml of e-liquid per day. 28% consumed 7-10 ml and 20% 1-3 ml per day. 9% of e-cigarette users consumed 11-15 ml of e-liquid per day, 7% consumed 16-20 ml and 4% consumed more than 20 ml.



E-cigarette users were asked where they got their e-liquids. Respondents had the opportunity to mark multiple answers and add additional ones if they wished. 71% of the respondents had bought e-liquids from an Estonian e-cigarette shop, whereas it was the only place where 44% of the respondents had bought e-liquids. 16% said they had bought e-liquids on the black market, with 6% saying it was their only place of purchase. 15% had obtained e-liquids from a friend, for 5% it was also the only way to obtain e-liquids. 14% of respondents said that they had bought e-liquids from a store elsewhere in the European Union, and for 3% of users it was the only place to buy e-liquids. 8% of users had bought e-liquids from ordinary points of sale in Estonia, and 3% of the respondents had bought their e-liquids only from there.

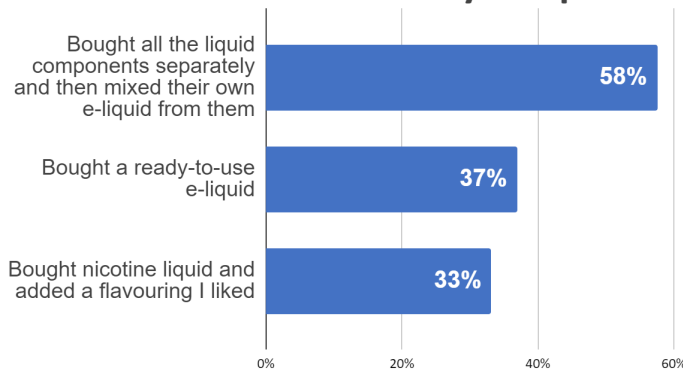
7% stated that they had bought e-liquids from an e-store in Estonia. As distance selling of e-cigarettes and e-liquids is prohibited in Estonia, this might have been a situation where an e-cigarette user ordered e-liquid components from an e-store and mixed their own e-liquid, or it was a secret e-commerce. 6% of respondents indicated that they have procured e-liquids from places other than the proposed options. It mainly included self-mixing of e-liquids and sourcing them from acquaintances.

Where do users buy e-liquids?



The survey inquired in what form the users of e-cigarettes had bought their e-liquids. 58% stated that they had bought all the liquid components for an e-cigarette separately and then mixed their own e-liquid from them. 37% of regular users had bought a ready-to-use e-liquid. 33% had bought nicotine liquid and added a flavouring they liked.

In what form did users buy e-liquids?

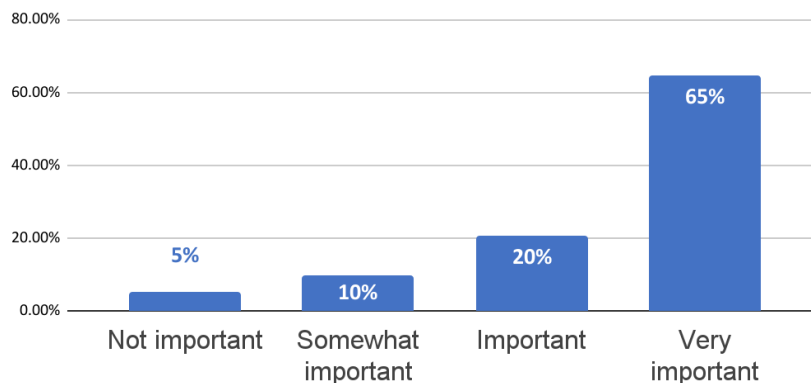


For 42% of e-cigarette users, mixing e-liquid from separate components was the only way for them to obtain e-liquid. 20% of regular e-cigarette users use only ready-made e-liquids. For 17%, the only way to get an e-liquid was to buy nicotine liquid and add a flavouring of their choice. 21% have used various methods.

Flavours of e-liquids

Those survey participants who had experience with e-cigarettes were asked how important it was for them to have flavours in e-liquids. For 65%, the presence of flavours in e-liquids was very important, 20% considered it important and 10% somewhat important. For 5%, the presence of flavours in e-liquids was not important.

How important is the availability of flavoured e-liquids?



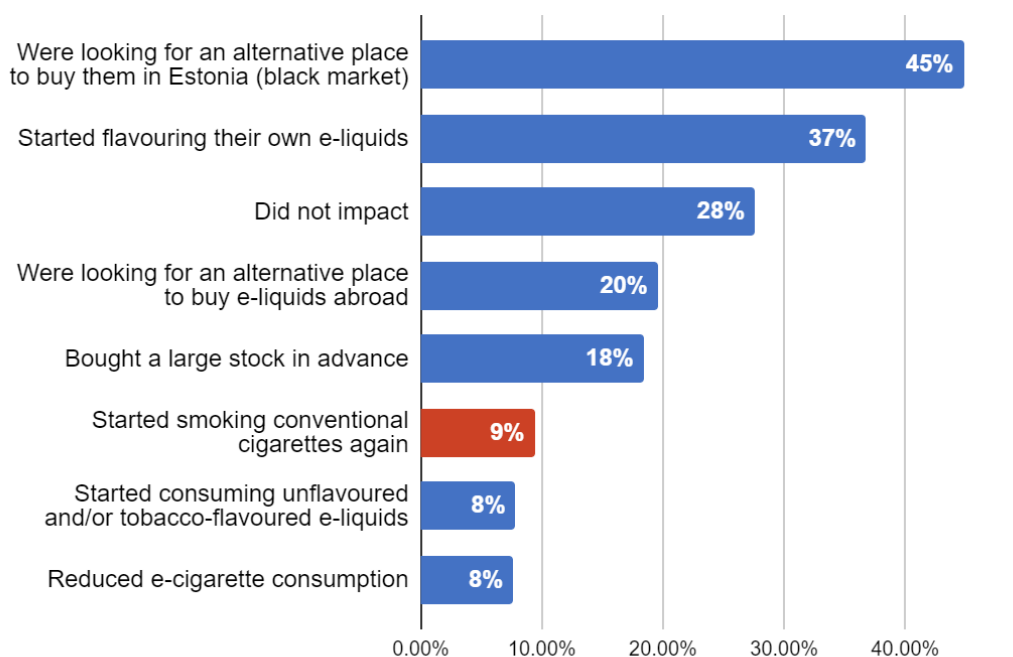
Among regular e-cigarette users, there were 70% of those who considered flavours in e-liquids to be very important. It was important for 17% and somewhat important for 8%. 5% of regular users stated that flavours in e-liquids were not important for them.

The impact of the changes made in 2019 on e-cigarette users

Current and former regular users of e-cigarettes were asked how they were affected by the ban on the sale of flavoured e-liquids that came into force on 1 July 2019? Respondents had the opportunity to indicate one or more options. Almost half (45%) stated that they were looking for an alternative place to buy them on the Estonian black market. 20% were looking for an alternative place to buy e-liquids abroad and 18% bought a large stock in advance.

37% of respondents said that they started flavouring their own e-liquids. 8% started consuming unflavoured and/or tobacco-flavoured e-liquids, which were the only ones available after the changes that came into force in July 2019. 9% of respondents said they started smoking regular cigarettes. E-cigarette consumption was reduced by 8% of respondents. 28% of respondents said that they were not affected by the changes that came into force in July 2019.

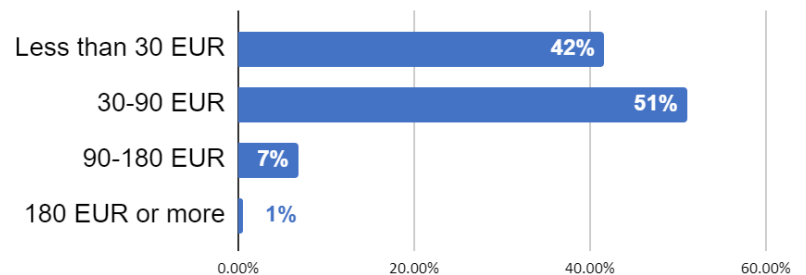
How did the flavoured e-liquid sale ban from 1st of July 2019 impact e-cigarette users?



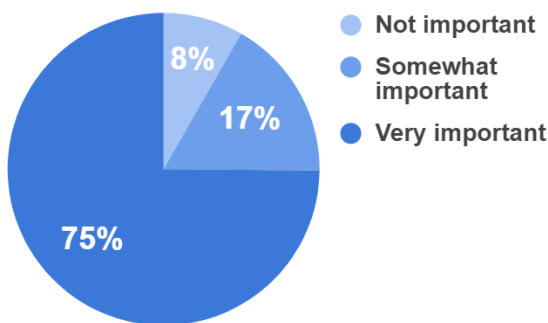
Expenditure on e-cigarette liquids

51% of e-cigarette users spent on average 30-90 euros a month buying e-liquids. 42% of users spent less than 30 euros. 7% spent 90-180 euros on e-liquids per month and less than 1% spent more than 180 euros.

Expenditures on e-cigarette liquids by users (EUR)



Importance of amount spent on e-liquid



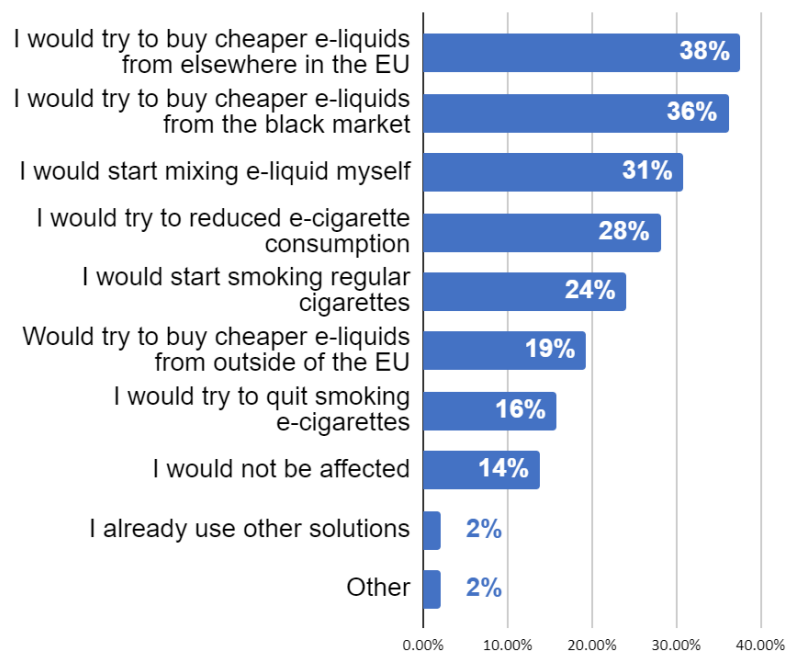
When asked how important the amount of money spent on e-liquid was, 75% said it to be very important. For 17%, the amount spent on e-liquids was somewhat important. 8% of regular e-cigarette users stated that the amount spent on e-liquids was not important to them.

Impact of possible price change on e-cigarette use

Users were asked how they would behave if the price of e-liquid were to increase significantly? 38% would try to buy cheaper e-liquids from elsewhere in the EU and 19% from outside the EU (this was the only solution for 7% of respondents). 36% would try to get cheaper e-liquids on the black market and 31% would start mixing their own e-liquids. 28% would try to reduce e-cigarette consumption and 24% would start smoking regular cigarettes. 14% found that they would not be affected by a significant increase in the price of e-liquids.

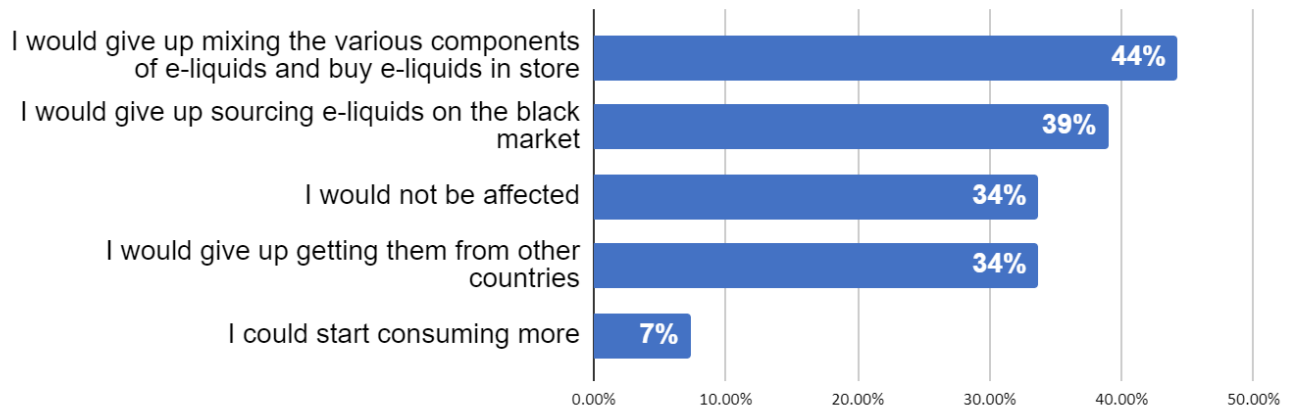
28% would try to reduce the use of e-cigarettes in case of price increase and 16% would try to quit e-cigarettes altogether. 24% said they would start smoking regular cigarettes. 14% found that they would not be affected by a significant increase in the price of e-liquids.

How would you act if the prices of e-liquids were significantly increased?



Users were also asked how they would act if the prices of e-liquids were significantly reduced. 44% answered that in this case they would give up mixing the various components of e-liquids and buy e-liquids in store. 39% would give up sourcing e-liquids on the black market and 34% would give up getting them from other countries. 34% found that they would not be affected by a fall in the price of e-liquids, 7% thought that they could start consuming more e-liquids.

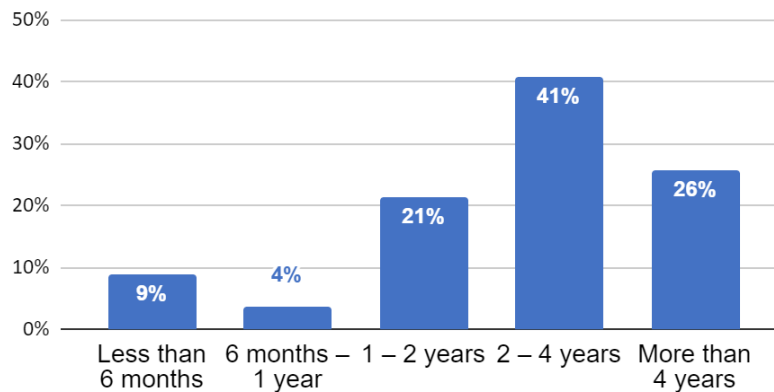
How would you act if the prices of e-liquids were significantly reduced?



Former e-cigarette users

9% of former regular e-cigarette users had smoked them for less than 6 months. 4% had used e-cigarettes for 6 months to a year. 21% had used e-cigarettes for 1-2 years, 41% for 2-4 years. 26% had used e-cigarettes for four or more years, including 6% who had used them for 6-8 years.

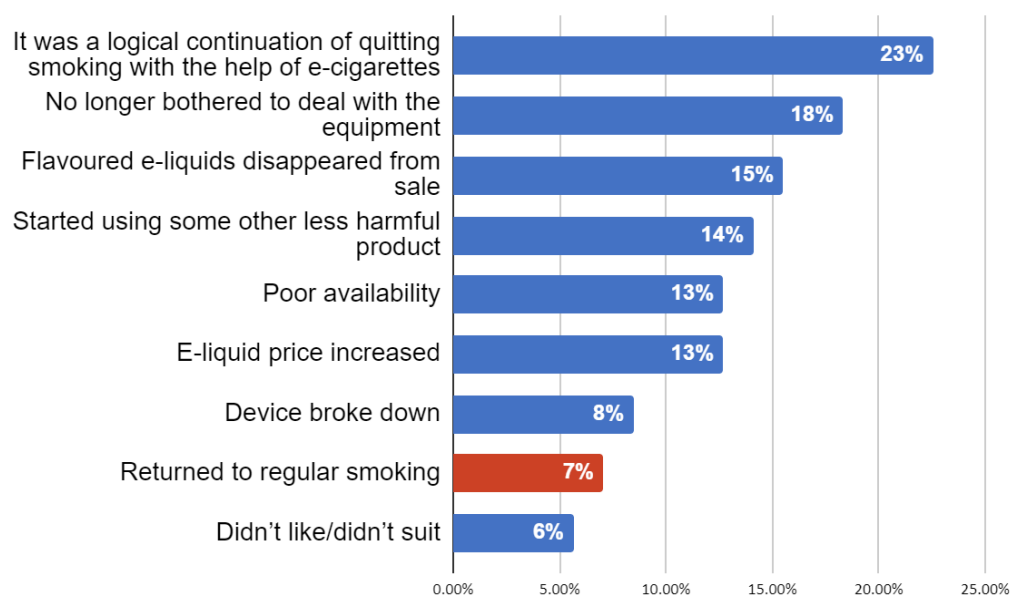
Former e-cigarette users divided by the time of using



Why did you stop smoking e-cigarettes?

Those who had used e-cigarettes regularly in the past were asked why they had quit smoking e-cigarettes. It was mostly pointed out that quitting e-cigarettes was a logical continuation of quitting smoking with the help of e-cigarettes. There were those who no longer bothered to deal with the equipment or their device broke down. The reasons given for quitting e-cigarettes were that their availability was poor, flavoured e-liquids disappeared and the price increased. There were those who started using some other less harmful product. Many pointed out that because of the better availability of regular cigarettes, they returned to regular smoking.

Why did you stop using e-cigarettes?



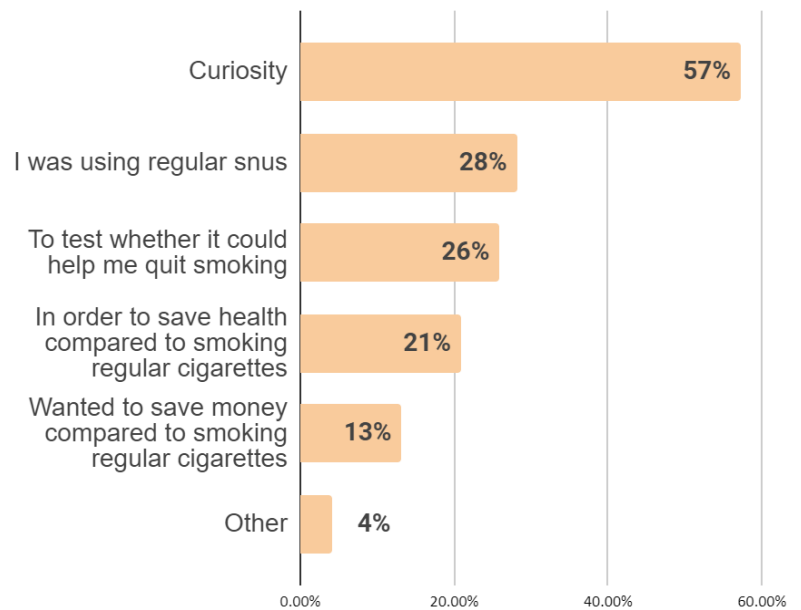
USING TOBACCO-FREE SNUS

Experience with tobacco-free snus

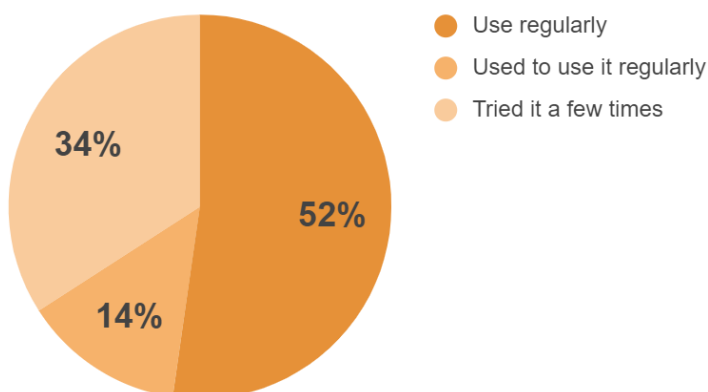
36% of survey participants had had experience with tobacco-free snus. 76% of them were men and 24% were women. The age groups of people with experience in using tobacco-free snus were as follows: 38% were aged 18-21, 39% were aged 22-30, 16% were aged 31-40, 5% were aged 41-50, less than 1% were aged 51-60, and 0.5% were aged 61 or over.

Users of tobacco-free snus were asked why they tried the product for the first time. 57% answered it was because of interest. For 40%, it was the only reason. 28% stated that they were motivated to try tobacco-free snus for the first time by the fact that they were using regular snus. 26% tried tobacco-free snus to test whether it could help them quit smoking. 21% wanted to try tobacco-free snus for the first time in order to save health compared to smoking regular cigarettes, and 13% wanted to save money compared to smoking regular cigarettes.

Why did you try a tobacco-free snus for the first time?



Experience with tobacco-free snus



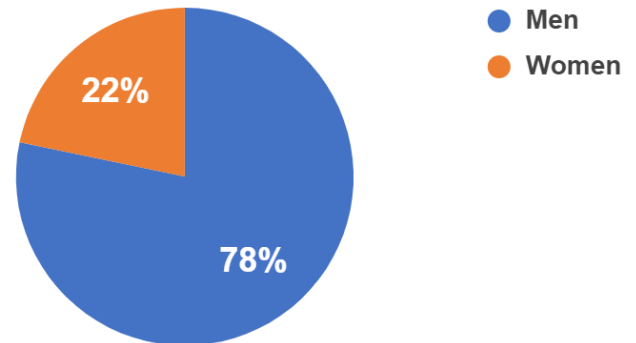
52% of those who used tobacco-free snus did it regularly. 14% used it regularly and 34% tried it a few times.

Regular users of tobacco-free snus

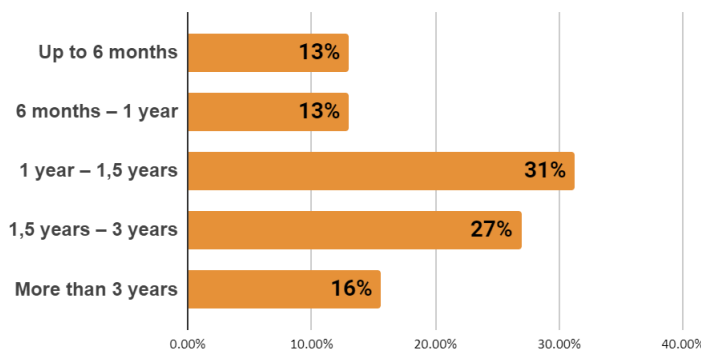
78% of regular users of tobacco-free snus were men and 22% were women. 40% of regular tobacco-free snus users were aged 18-21 and 38% were aged 22-30. Among regular users, 16% were aged 31-40 and 6% were aged 41-50.

The largest share of regular users of tobacco-free snus was formed by people living in the City of Tallinn (31%), followed by Harju County (except Tallinn) (21%), the City of Tartu (12%) and Tartu County (except Tartu) (10%). In other counties, regular users of tobacco-free snus accounted for 26% of all users of tobacco-free snus.

Gender division of regular users of tobacco-free snus



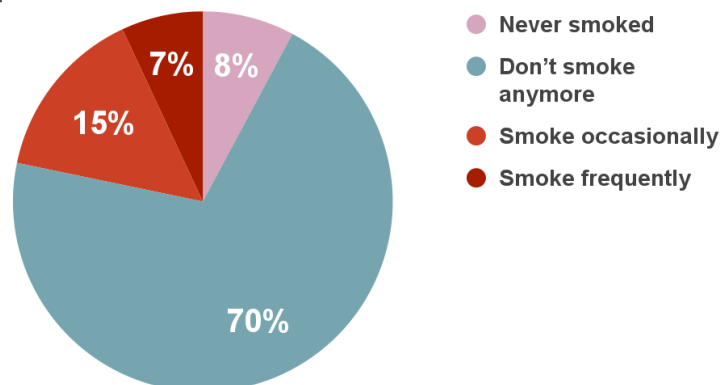
Regular users of tobacco-free snus divided by usage time



31% of regular users had used tobacco-free snus for 1-1.5 years, 13% for less than 6 months and 13% for 6 months to 1 year. 27% stated that they had used tobacco-free snus for 1.5-3 years and 16% for more than 3 years. It must be taken into account that tobacco-free snus has been sold in Estonia since July 2019. Thus, users who indicated that they had used tobacco-free snus for more than a year and a half might have purchased the products from outside Estonia or included regular snus.

70% of tobacco-free snus users no longer smoked. 15% stated that they smoke occasionally, and 7% said that in addition to using tobacco-free snus, they smoke frequently. 8% of tobacco-free snus users said they had never smoked.

Tobacco-free snus users divided by smoking experience



Health effects of tobacco-free snus

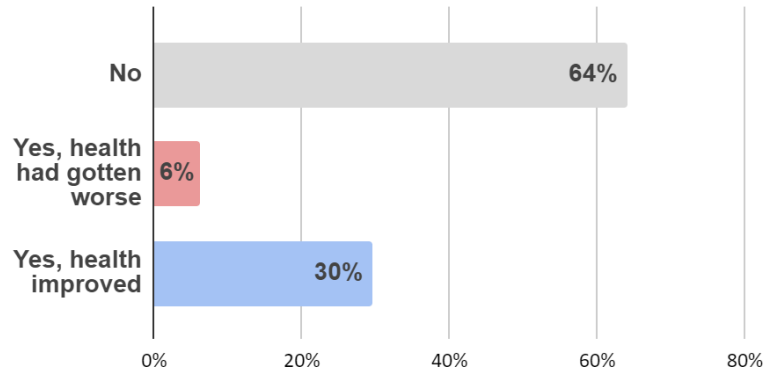
Current and former users of tobacco-free snus were asked if they noticed any changes in their health after starting to use tobacco-free snus. 64% said they did not notice any change in their health, 6% found their health had gotten worse and 30% assessed that their health had improved.

The 6% who found their health had gotten worse reported that using tobacco-free snus was associated with higher blood pressure and mild anxiety.

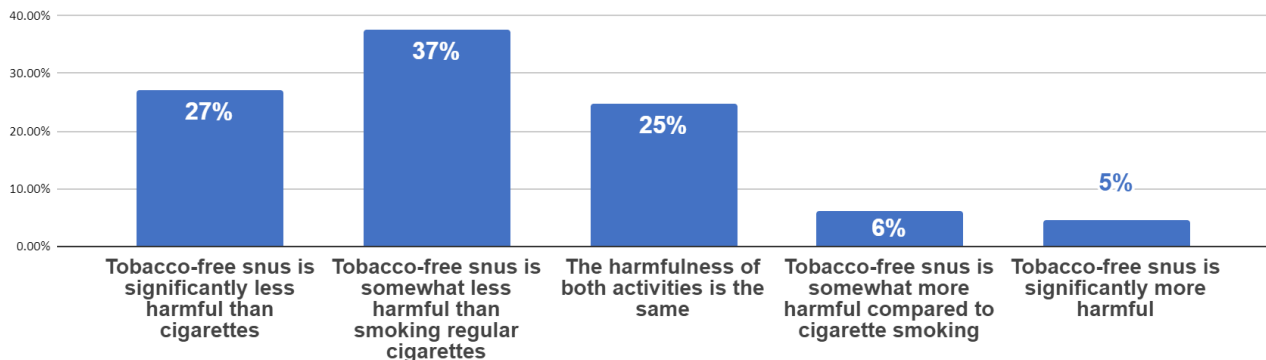
There were those who said that tobacco-free snus caused them drowsiness. It was also mentioned that oral hygiene suffered.

The 30% who found that their health improved after the introduction of tobacco-free snus indicated that their breathing improved and their smoker's cough decreased or disappeared, compared to the period when they smoked. Some pointed out that they had more strength and energy and their sense of smell and taste was restored. In addition, some said that their oral hygiene improved compared to smoking regular cigarettes.

Did you notice any changes in your health after starting to use tobacco-free snus?



Respondents' evaluation concerning health impact of snus compared to regular cigarettes



All survey participants were asked about the harmfulness of tobacco-free snus and regular cigarettes. 37% found that tobacco-free snus was somewhat less harmful than smoking regular cigarettes. 27% considered that tobacco-free snus was significantly less harmful than cigarettes. 25% found that the harmfulness of both activities was the same. 6% said that tobacco-free snus was somewhat more harmful compared to cigarette smoking, and 5% thought that it was significantly more harmful.

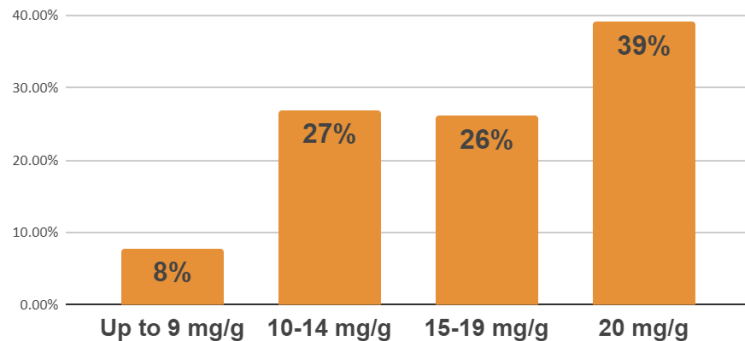
Tobacco-free snus pouches

39% of users use tobacco-free snus with 20 mg/g of nicotine. 27% stated that the tobacco-free snus they used contained 10-14 mg/g of nicotine, 26% of users 15-19 mg/g. 8% use tobacco-free snus with up to 10 mg/g of nicotine. The nicotine content of the tobacco-free snus used by the survey participants did not exceed 20 mg/g.

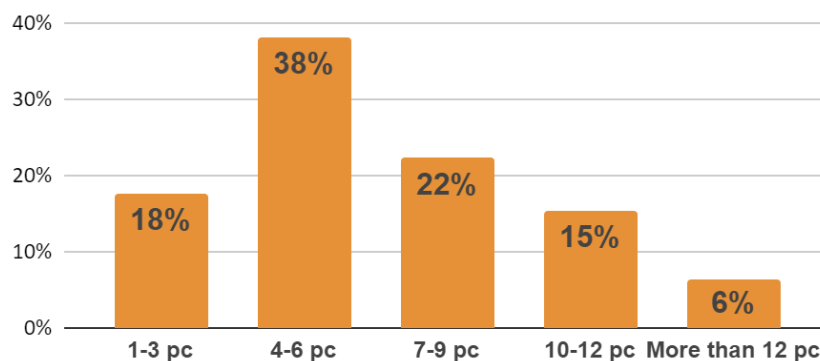
It was asked in the survey how the nicotine content of the tobacco-free snus they consumed had changed.

57% had used tobacco-free snus with the same nicotine content. 25% of respondents said they had introduced tobacco-free snus with a higher nicotine content and 17% had started using tobacco-free snus with a lower nicotine content.

How much nicotine is in your nicotine pouch (mg/g)?



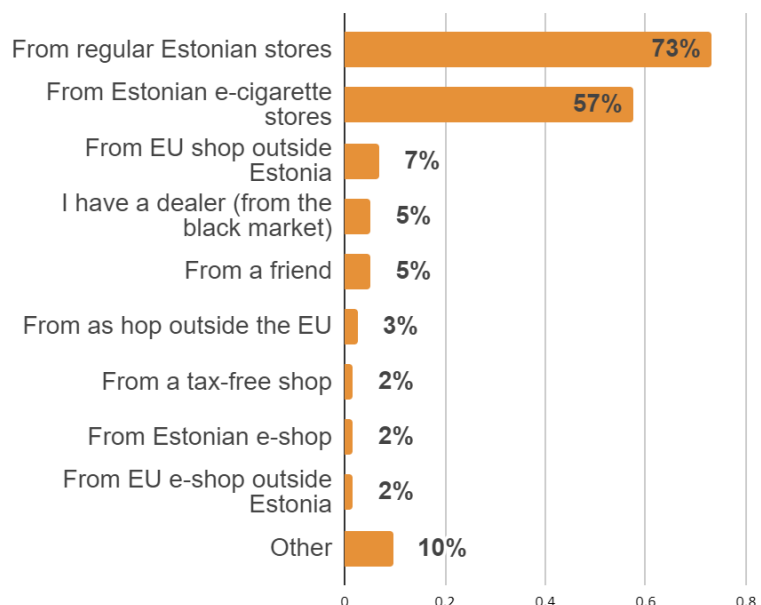
How many tobacco-free snus pouches do you consume in average per day?



Half of the users of tobacco-free snus consumed an average of up to 6 pouches of tobacco-free snus per day. 38% used an average of 4-6 tobacco-free snus pouches, 22% 7-9 pouches, 18% 1-3 pouches and 15% 10-12 pouches per day. 6% used an average of more than 12 pouches a day. The maximum daily average volume was indicated as 20 pouches.

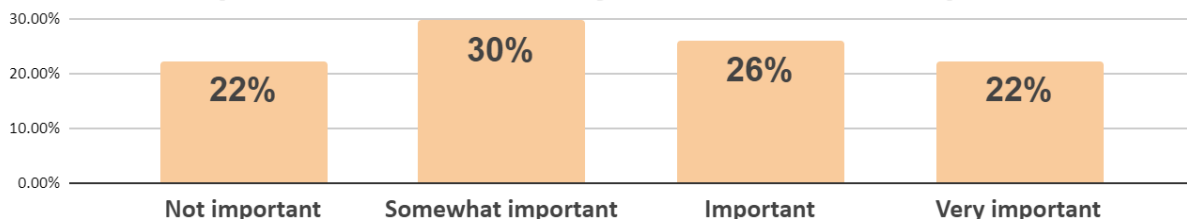
Of regular users, 73% had bought tobacco-free snus from regular stores and 57% from e-cigarette stores. 7% had purchased tobacco-free snus from outside Estonia, 5% from the black market and 5% from a friend. Under “other” responses, 6% stated that they had purchased tobacco-free snus from shops specializing in the sales of tobacco-free snus.

Where do you get tobacco-free snus?

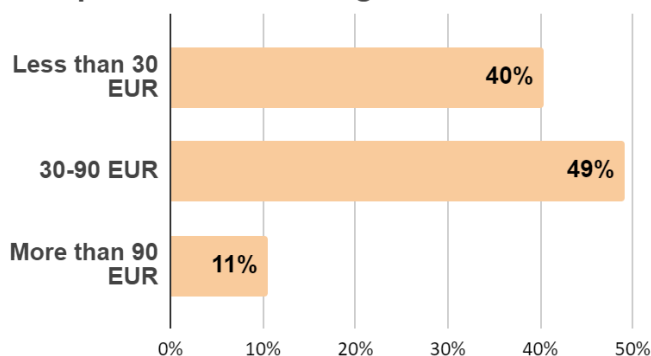


Respondents with experience in using tobacco-free snus were asked how important flavours were for them. 30% answered that the presence of flavours in tobacco-free snus was somewhat important for them, 26% said that it was important for them. For 22%, flavours in tobacco-free snus were very important, as were those for whom flavours were not important.

How important is the availability of flavored nicotine pouches?



How much do you spend on tobacco-free snus per month in average?



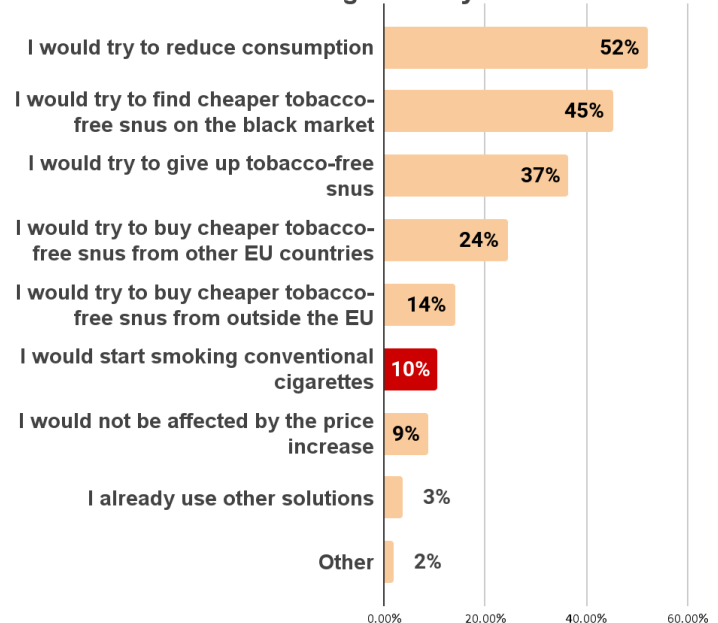
49% of users bought tobacco-free snus for an average of 30-90 euros a month. 40% of users spent less than 30 euros per month and 11% more than 90 euros.

For 34% of users, the amount spent on tobacco-free snus was very important. It was important for 31% and somewhat important for 30%. 5% replied that the amount spent on tobacco-free snus was not important to them.

Impact of a possible price change

Users were asked what they would do if the price of tobacco-free snus increased significantly. It was possible to choose several options and add additional answers if desired. 52% thought they would try to reduce consumption, 45% would try to find cheaper tobacco-free snus on the black market. 37% answered that they would try to give up tobacco-free snus in the event of a significant price increase. 24% would try to buy cheaper tobacco-free snus from other EU countries and 14% from outside the EU. 10% answered that they would start smoking regular cigarettes in that case. 9% said they would not be affected by the price increase, while 3% said they were already using other solutions and would not be affected by the price increase of tobacco-free snus sold in the stores.

How would you act if the price of nicotine pouches increases significantly?



Users were also asked how they would act if the price of tobacco-free snus were to fall significantly. 65% of respondents thought they would not be affected, 23% would stop buying tobacco-free snus on the black market and 22% would stop bringing tobacco-free snus from other countries. 7% indicated that they could increase consumption in such a situation.

Giving up tobacco-free snus

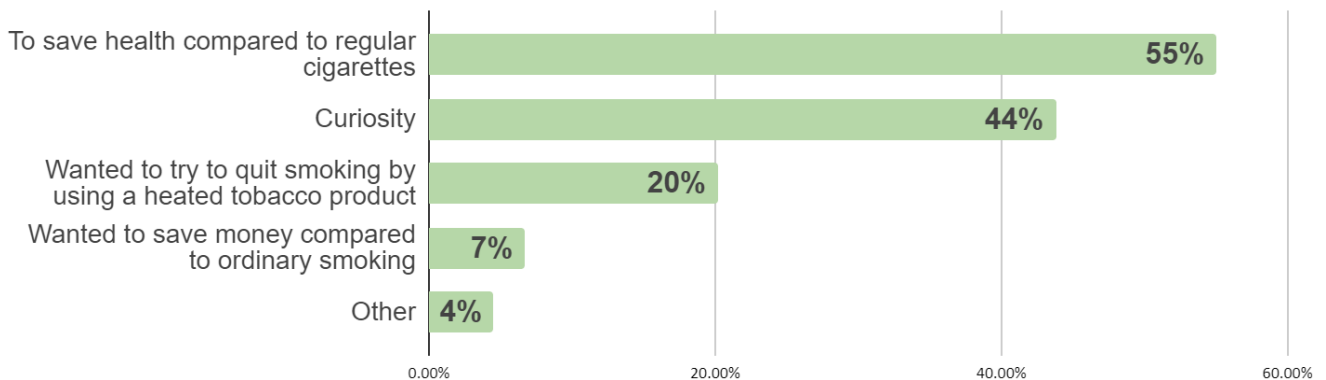
Those who had used tobacco-free snus regularly in the past were asked why they gave it up. Some gave up tobacco-free snus because they no longer wanted to consume such products. Some replied that tobacco-free snus was not suitable for them and they continued to use e-cigarettes. Some gave up tobacco-free snus because they noticed negative health effects after using it.

USING HEATED TOBACCO PRODUCTS

Experience with using heated tobacco products

15% of the respondents had had experience in using heated tobacco products. 54% of them were men and 46% were women. Among people with experience in using heated tobacco, 39% were aged 31-40, 24% were aged 22-30, 20% were aged 41-50, 9% were aged 51-60 and 8% were aged 18-21.

Why did you try heated tobacco for the first time?



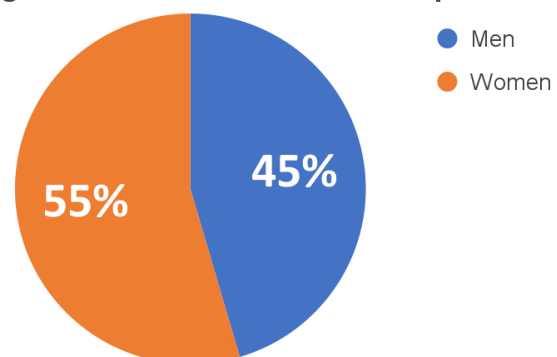
Those who had had contact with heated tobacco were asked why they had tried it for the first time. 55% tried heated tobacco for the first time to save health compared to regular cigarettes, 44% mentioned interest as a motivation to try, and 20% wanted to try to quit smoking by using a heated tobacco product. 7% also cited the desire to save money compared to ordinary smoking as a reason. Another reason mentioned was the desire to avoid the smell of smoking a regular cigarette.

Of those who had experience using heated tobacco, 61% were regular users. 6% had used the product regularly for some time and 34% tried it only a few times.

Regular users of heated tobacco products

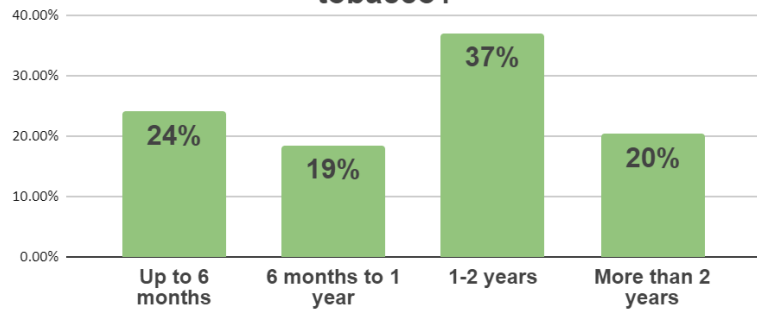
Among regular users of heated tobacco products, 55% were women and 45% men. People aged 31-40 were the biggest users of heated tobacco, accounting for 42% of all users. They were followed by people aged 41-50 with 27% and people aged 22-30 with 16%. People aged 18-21 (5%) and those aged 51-60 (9%) were the smallest age groups to regularly use heated tobacco.

Regular users of heated tobacco products

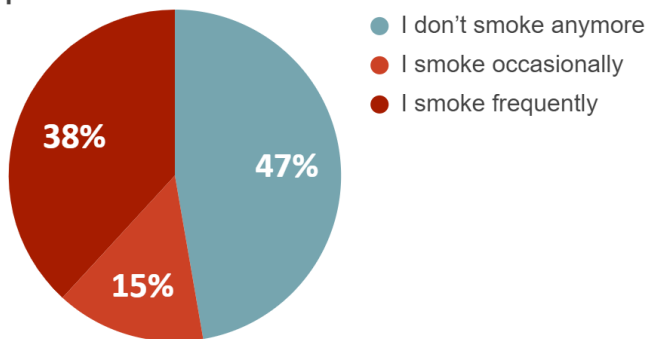


Among regular users of heated tobacco products, the largest number (37%) were those who had used heated tobacco for 1-2 years. 24% stated that they had used heated tobacco for 1-6 months. 20% of regular users of heated tobacco products had used them for more than two years. 19% had used heated tobacco for six months to a year.

For how long you have been using heated tobacco?



Heated tobacco users divided by smoking experience



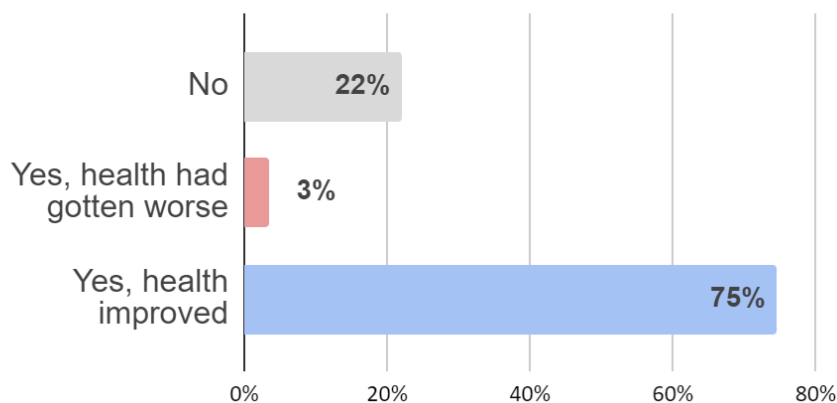
Heated tobacco users were asked what their experience with smoking was, and 47% said they no longer smoked. 15% stated that in addition to using a heated tobacco product, they occasionally smoked regular cigarettes. 38% said they smoked often.

There were no users of heated tobacco products who had not smoked previously.

Health effects of heated tobacco products

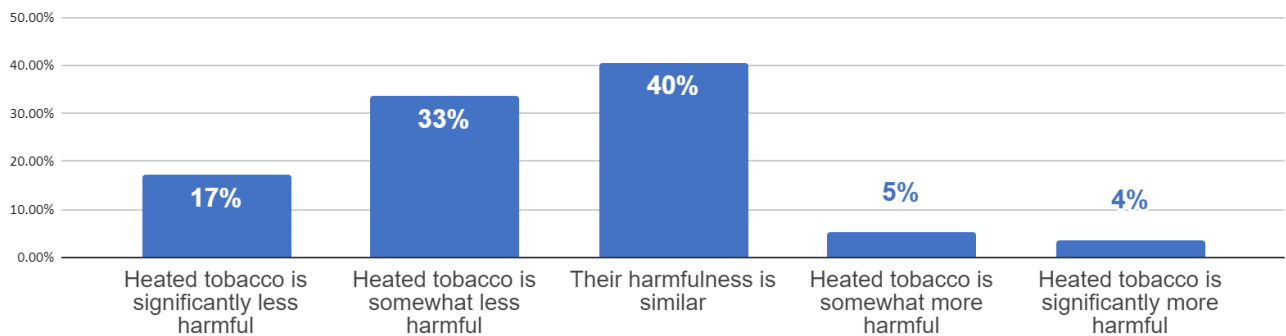
Current and former regular consumers were asked if they noticed any changes in their health after starting to use heated tobacco. 22% did not notice any changes in their health after the introduction of heated tobacco. 3% felt that their health got worse. 75% of users said that their health improved after the introduction of heated tobacco.

Did you note changes in your health after using of heated tobacco products?



All participants in the survey were asked how they assessed the health effects of using heated tobacco products compared to smoking regular cigarettes. 40% of all participants in the survey found that their harmfulness was similar. 33% found that heated tobacco was somewhat less harmful than regular cigarettes, and 17% indicated that the use of heated tobacco products was significantly less harmful than smoking regular cigarettes. 5% assessed that heated tobacco was somewhat more harmful than regular cigarettes, and 4% thought that heated tobacco was significantly more harmful than regular cigarettes.

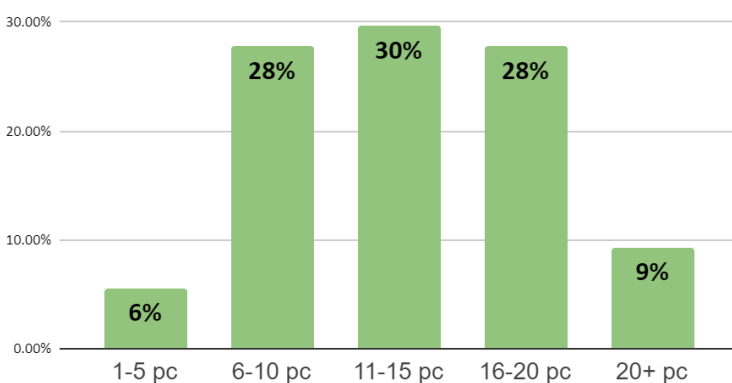
Respondents' evaluation concerning health impact of heated tobacco compared to regular cigarettes



At the same time, 55% of those with experience in using heated tobacco products found that they were significantly less harmful than regular cigarettes. 36% indicated that it was a somewhat less harmful activity and 6% thought their harmfulness was similar. 2% found that heated tobacco was significantly more harmful and 1% said it was somewhat more harmful than ordinary smoking.

CONSUMPTION OF HEATED TOBACCO PRODUCTS

How many sticks of heated tobacco you consume on average per day?

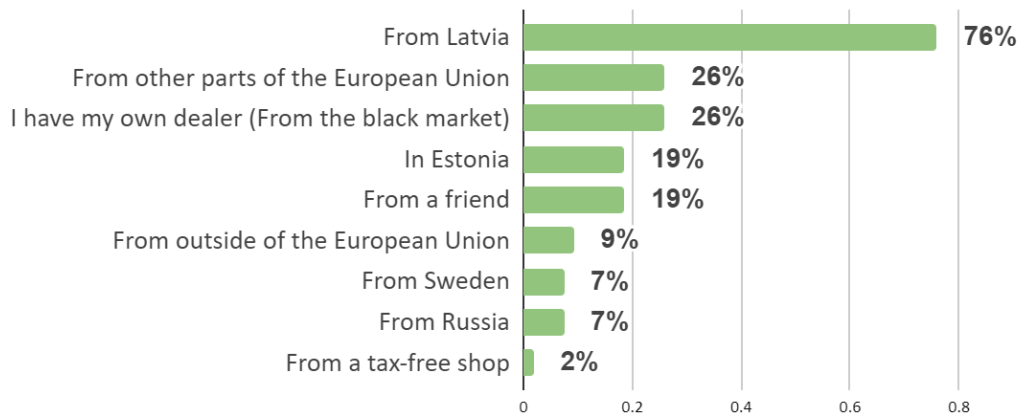


Respondents who regularly used heated tobacco products were asked how many sticks of heated tobacco they consumed on average per day. **Half of users consumed up to 15 sticks of heated tobacco per day.** 30% of the respondents consumed 11-15 sticks of heated tobacco a day. Equally 28% were those who consumed 6-10 sticks of heated tobacco per day and those whose daily consumption was 16-20 sticks of heated tobacco. 9% consumed more than 20 and 6% 1-5 sticks of heated tobacco per day.

Acquisition of heated tobacco products

Regular consumers of heated tobacco were asked where they bought the products. At the time of the start of the survey, heated tobacco products were not sold in Estonia and it was not known if and when they would be placed on the market. Therefore, there were no Estonian outlets in the selection. However, it was possible to add such places as additional answers. The first heated tobacco products were released in Estonia in mid-December, which is why the answers of the survey participants revealed that they had purchased these products from Estonia.

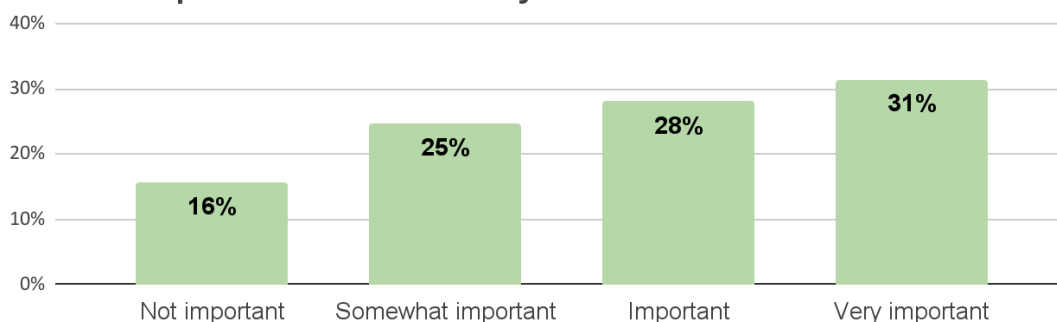
Where do you get heated tobacco from?



76% of regular consumers of heated tobacco had bought the products from Latvia, 7% from Sweden, 26% from other parts of the European Union and 7% from Russia. 26% had bought the products on the black market and 19% from a friend. During the conduct of the survey, heated tobacco products were released in Estonia, and 19% of regular users of heated tobacco had experience in purchasing them locally at the end of the survey.

People who had been using heated tobacco products were asked for their opinion of how important is the availability of flavours in heated tobacco. Flavours were very important for 31%, important for 28% and somewhat important for 25%. For 16%, the presence of flavours in heated tobacco products was not important.

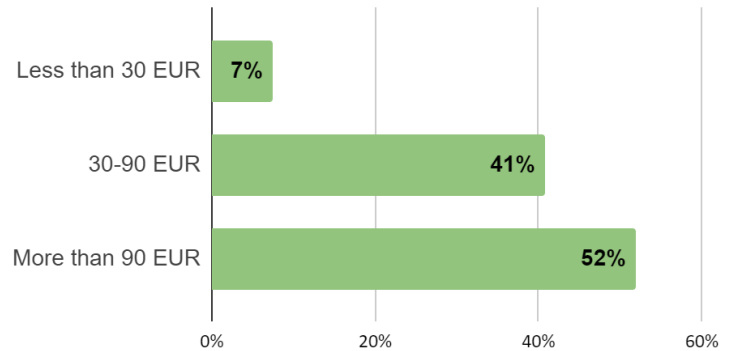
How important is the availability of flavours in heated tobacco?



52% of users bought heated tobacco products for more than 90 euros a month. 41% of users spent between €30 and €90, and 7% said they consumed less than €30 on average per month.

The amount spent on heated tobacco was very important for 30% of users and important for 31%. The amount spent per month on heated tobacco was somewhat important for 28% of regular users and not important for 11%.

How much do you spend on heated tobacco per month?



Giving up heated tobacco

Those who had regularly used heated tobacco products in the past were asked why they gave them up? The reasons cited were pregnancy or the introduction of another less harmful product.